

**INFORMATION &  
REFERRAL CLERK  
GS-0303-04**

**FAMILY SERVICES  
CENTER**

**I. POSITION AND ORGANIZATION INFORMATION****Position:**

Information & Referral Clerk (Office Automation), GS-0303-04

**Purpose of position:**

The work of this position is to perform somewhat difficult and responsible clerical work in office, business, or fiscal operations, requiring some training and experience gained from previous work experience and training, a working knowledge of a subject matter area, or the exercise of independent judgment in accordance with well-established procedures.

**Organization:**

QOL Dept., Family Service Center

**Organization goals:****II. MAJOR DUTIES****A. Duty (Critical):**

Receives and directs telephone calls or visitors. Based on good working knowledge of FSC and family related programs, knowledge of the organization, and exceptional customer service skills, refers telephone callers and visitors to appropriate staff or office. Personally answers routine and moderately complex requests for information such as base directions, child care resources, emergency services, health care resources, etc. (25%)

**Tasks:**

1. Refers callers/visitors to appropriate personnel.
2. Takes and delivers telephone messages.
3. Answers routine and moderately complex questions.
4. Refers more difficult questions to appropriate personnel.

**Selected Staffing KSAs:**

A1, A2, A3, A4

**B. Duty (Critical):**

Processes incoming mail. Routes and distributes mail to appropriate individuals. Opens and reads mail that is undesignated and determines proper routing by subject matter. Delivers mail to other offices. May maintain a mail control log. Establishes suspense dates as directed by the supervisor and brings to supervisor's attention those that require prompt attention or those that cannot be met by requested dates. (25%)

**Tasks:**

1. Routes incoming mail to appropriate people or office in a timely manner.
2. Follows up on suspense items to ensure completion by the suspense dates.

**Selected Staffing KSAs:**

A1, A2, A3, A4

**C. Duty (Critical):**

Maintains files and posts updates to manuals on policies, directives, and memoranda. Sets up and maintains a variety of files involving numerous subject headings and subheadings. Indexes materials. Maintains, files, purges, and disposes of office records/files in accordance with established regulations and procedures. Locates items in files and searches for missing or incorrectly filed items. Maintains a bulletin board, selecting and filing deleted material for future reference. Records and files information on specific cases, current project, and/or studies for personnel within the office. (25%)

**Tasks:**

1. Maintains and updates file system to enable quick and efficient retrieval of information.
2. Retrieves information from files as requested.

**Selected Staffing KSAs:**

A1, A2, A3, A4, A5

**D. Duty (Critical):**

The employee uses the full range of functions, including advanced processes, of one or more word processing software applications to produce a wide variety of documents. If needed, uses various functions of other software types such as desktop publishing, calendar, electronic mail, spreadsheets, or graphics. (25%)

**Tasks:**

1. Types, edits, formats and prints a wide variety of documents for the office staff, including correspondence, technical reports, organizational proposals and justifications, technical notes and similar material in accordance with established guidelines and procedures. Source materials are either written drafts or voice recordings. Some complex formats require the integration of material from one type of software application (i.e, database, graphics, spreadsheet) into the word processing document.
2. Determines the appropriate form, arrangement and spacing for the document, based on the nature of the subject matter being typed and its intended use.
3. Resolves problems involving the interpretation of drafts by contacting the originator or by relying on previous experience.
4. Edits material and makes necessary corrections in grammar, punctuation, spelling, and format.
5. Consolidates information for various reports in accordance with established procedures and deadlines.

6. Maintains documents in electronic files for easy retrieval. Makes backup copies of stored data as appropriate.

7. Operates a computer, peripheral equipment and appropriate software to perform various computer operations in support of office operations, such as producing reports, maintaining databases, and inputting time cards and travel order information.

**Selected Staffing KSAs:**

A6, A7, A8, A9, A10, A11, A12

**III. KNOWLEDGES, SKILLS AND ABILITIES (KSAs)**

**A. Selected Staffing KSAs:**

1. Working knowledge of general office administrative and clerical procedures to distribute mail, answer telephone, keep appointment calendar, maintain files/office forms, and order supplies.

2. Ability to learn organization's functions and procedures sufficient to receive visitors or telephone calls, distribute mail, and maintain files, etc.

3. Ability to read and interpret specific procedural guides such as instructions, manuals, established policies and procedures for assigned tasks such as filing, distributing mail, or ordering supplies, which are directly applicable to the work.

4. Ability to communicate effectively orally using tact and courtesy.

5. Ability to learn filing system and procedures.

6. Knowledge of automation tools

7. Ability to use office automation technology to generate reports, briefing materials and/or comparable documents; must be a qualified typist

8. Knowledge of the organizational and functional responsibilities and operations of the organization

9. Knowledge of word processing software functions

10. Knowledge of correspondence rules and regulations

11. Ability to prepare and/or edit written correspondence, ensuring proper use of English grammar, spelling and punctuation

12. Ability to communicate orally

**B. Basic Training Competencies:**

1. Working knowledge of general office administrative and clerical procedures to distribute mail, answer telephone, keep appointment calendar, maintain files/office forms, and order supplies.

2. Ability to learn organization's functions and procedures sufficient to receive visitors or telephone calls, distribute mail, and maintain files, etc.

3. Ability to read and interpret specific procedural guides such as instructions, manuals, established policies and procedures for assigned tasks such as filing, distributing mail, or ordering supplies, which are directly

applicable to the work.

4. Ability to communicate effectively orally using tact and courtesy.

5. Ability to learn filing system and procedures.

6. Knowledge of automation tools

7. Ability to use office automation technology to generate reports, briefing materials and/or comparable documents; must be a qualified typist

8. Knowledge of the organizational and functional responsibilities and operations of the organization

9. Knowledge of word processing software functions

10. Knowledge of correspondence rules and regulations

11. Ability to prepare and/or edit written correspondence, ensuring proper use of English grammar, spelling and punctuation

12. Ability to plan, organize, prioritize work, and meet deadlines

13. Ability to communicate orally

14. Ability to communicate in writing

#### IV. CLASSIFICATION FACTORS

##### Factor 1. Knowledge

1. -- Working knowledge of the staff functions of the office to which assigned to maintain files, receive telephone calls and visitors, and process incoming mail.

-- Knowledge of common clerical practices and procedures applicable to the processing of forms and requests used in various office support tasks, such as time and attendance and office supply requisitioning.

-- Ability to follow instructions, comprehend, and apply guides and instructions for assigned tasks, such as filing correspondence, maintaining time and attendance information, and ordering office supplies.

2. - Knowledge of the capabilities, operating characteristics, and advanced functions of one type of office automation software (e.g., word processing, desktop publishing, graphics, database, spreadsheet, or communication).

- Knowledge of processing procedures for performing a substantial range of functions of several software types for various office needs. Skill sufficient to perform such tasks as producing a wide range of documents incorporating data from different software applications, or updating databases or spreadsheets.

3. - Knowledge of the advanced functions of one or more word processing/desktop publishing software packages to be able to perform a substantial range of operations and produce complex formats. Examples of advanced functions include: generating table of contents, importing graphics, or establishing the precise alignment of multiple columns.

##### Factor 2. Supervisory Controls

The employee independently completes recurring work, in line with the quality and timeliness criteria set by the supervisor. Receives additional instructions regarding new, difficult or unusual work at time of the initial assignment and during its progress. Seeks help when unfamiliar problems and/or assignment require a deviation from established procedures. Finished work and methods are reviewed in detail for compliance with procedures or instructions, technical accuracy and appearance.

**Factor 3. Guidelines**

The employee selects the most appropriate guidance from established procedures. Judgement is required either because the guides are numerous and similar, or because there are alternative procedures for accomplishing a function. Guidelines typically include software user manuals and tutorials, correspondence procedures, time and leave instructions, and sample work products. The supervisor is consulted if the existing guidelines cannot be applied or significant deviations are proposed.

**Factor 4. Complexity**

The employee performs duties that involve related steps, processes or methods that are often numerous and varied. Determines what needs to be done based on choices between alternatives with easily recognizable differences. Selects the appropriate procedures and/or action, choosing from options that differ in such things as the type of software used, type of document or report to be produced or edited, or existing prerecorded formats.

**Factor 5. Scope and Effect**

The employee performs routine tasks which facilitates the work of originators of the documents and others, primarily in the immediate work unit.

**Factor 6. Personal Contacts**

The employee regularly meets with agency employees from outside the immediate organization.

**Factor 7. Purpose of Contacts**

The employee contacts others to exchange information necessary to accomplish assignments.

**Factor 8. Physical Demands**

The employee does sedentary work, such as sitting comfortably. There may be some walking, standing, bending or carrying of light items.

**Factor 9. Work Environment**

The employee works in an adequately lighted and ventilated office environment. Observes normal safety precautions.

## V. CLASSIFICATION SUMMARY

## In this position:

The supportable grade is GS-04 because 25% of the work is at or above the GS-04 grade level. 25% of the duties are at the GS-04 grade level. 75% of the work is not grade controlling.

Duty A. 25% GS-0303-03 Clerk  
Receives and Directs Telephone Calls and Visitors

Duty B. 25% GS-0303-03 Clerk  
Processes Incoming Mail

Duty C. 25% GS-0303-03 Clerk  
Maintains Files and Posts Updates

Duty D. 25% GS-0326-04 Office Automation Clerk  
Word Processing/Basic Office Automation

## List of Modified Duties and Factors:

Title has been edited and may or may not be appropriate.

Duty A. has been edited. The final grade may or may not be appropriate.  
The factors have not been changed.

Duty D. has been edited. The final grade may or may not be appropriate.  
The factors have not been changed.

The classification criteria for the office automation work performed is based on the U.S. Office of Personnel Management (OPM) position classification standard for the Office Automation Clerical and Assistance Series, GS-326, and the Office Automation Grade Evaluation Guide (TS-100 dated November 1990). The Grade Level Guide for Clerical and Assistance Work (TS-91 dated June 1989) was referenced in evaluating the general clerical duties.

The classification criteria are contained in OPM Position Classification Standard for Miscellaneous Clerk and Assistant Series, GS-303, TS-34 dated Jan 79 and Grade Level Guide for Clerical and Assistance Work, TS-91 dated June 1989.

## CLASSIFICATION EVALUATION STATEMENT

Series Determination: Subject position is responsible for performing a variety of routine clerical work in office, business or fiscal operations such as filing, answering telephone, receiving visitors, and processing mail for which no appropriate occupational series has been established. This position meets the definition for inclusion in the GS-303 series.

Grade Determination: The Grade Level Guide for Clerical and Assistance Work provides general criteria for use in determining the grade level of

nonsupervisory clerical and assistance work and was used in evaluating the grade of this position. Grade evaluation for the Grade Level Guide for Clerical and Assistance Work is based on two evaluation factors: Nature of Assignment and Level of Responsibility.

A. Nature of Assignment:

Position exceeds the GS-02 grade level, which is characterized by several related tasks, steps, or operations and to be knowledgeable of the terminology and procedures of the organization. Duties of subject position require incumbent to independently perform routine assignments, which consist of many different prescribed tasks, steps, or operations, and to apply a thorough knowledge of the organization's functions and procedures in performing the work. In subject position, employee applies experience and judgment in handling situations that arise (e.g., using judgment in referring calls to the appropriate individual). The GS-02 level is exceeded.

Position meets the GS-03 grade level. At the GS-03 level, work consists of many different prescribed tasks, steps, or operations. At the GS-03 level, the employee applies a thorough knowledge of the organization's functions and procedures in performing the work and applies experience and judgment in handling situations that arise. Subject position is required to have a thorough knowledge of the organization's functions and procedures to distribute mail, refer visitors and phone calls, etc. Subject position is required to apply some experience and judgment in handling situations that arise (using judgment in referring visitors or calls to the appropriate individual). The GS-03 level is met.

Position fails to meet the GS-04 grade level. At the GS-04 level, work consists of a full range of assignments consisting of related steps, processes, or methods. The employee is required to have knowledge of an organization's programs and operations, rules, and processes. In subject position, employee is performing different tasks, steps, or operations in answering routine inquiries, ordering common supplies, etc. Subject position does not require knowledge of an organization's programs and operations but does require knowledge of the organization's functions and procedures.

B. Level of Responsibility:

Subject position exceeds the GS-02 grade level. At the GS-02 level, work is closely controlled. In some situations, the control is through the structured nature of the work itself. In other cases, the supervisor maintains control through review of the work by spot-checking progress and reviewing completed work for accuracy, completeness, and adherence to instructions and established policies. At the GS-02 level, a number of detailed and specific guides apply to the work (e.g., instructions, manuals, and established practices and procedures). Since subject position requires the use of a large number of procedural guides and often refers to written guides for help (e.g., determining proper routing indicator, maintaining files, etc.), the GS-02 level is exceeded.

Position meets the GS-03 grade level. In subject position, the supervisor provides individual assignments by explaining what is to be done and how to accomplish it. Employee performs individual assignments independently, unless



a problem occurs; in which case, the supervisor is available for assistance. Subject position requires a large number of procedural guides apply and employee often refers to written guides for help (e.g., referring some callers to the appropriate personnel or in providing information). The GS-03 level is met.

Position fails to meet the GS-04 grade level. At the GS-04 level, work is assigned in terms of methods to follow and results expected. The employee, at the GS-04 level, works independently in carrying out assignments of a continuing nature. At the GS-04 grade level, procedures for doing the work have been established and a number of specific guidelines are available. The number and similarity of guidelines and work situations requires the employee to use judgment in locating and selecting the most appropriate guidelines, references, and procedures. The employee makes minor deviations, at the GS-04 level, to adapt the guidelines in specific cases. In subject position, guidelines are normally specific and work is assigned by providing individual assignments as compared to methods to follow and results expected. The GS-04 level is not met.

Since subject position meets, but does not exceed, the GS-03 level on both grading criteria (Nature of Assignment and Level of Responsibility), the position is classified at the GS-03 grade level.

Title Determination: There are no specific titles required by the standard for this series of work. Since the position is primarily concerned with performing somewhat difficult and responsible clerical work, the title is allocated as Clerk.

GS-04

Grade: GS-04